



# USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/05 thru 09/11.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Sep 05, 2014

## NATIONAL SUMMARY

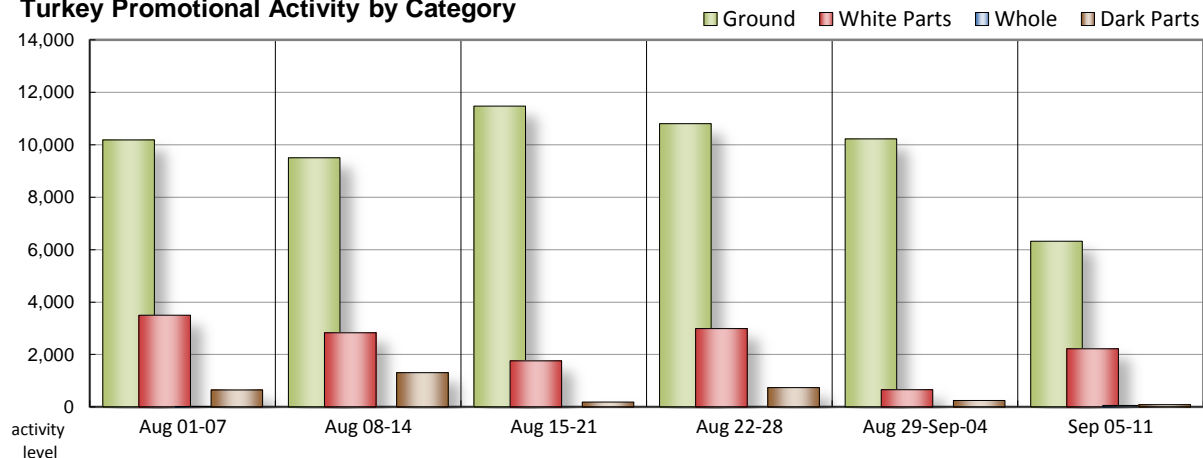
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate <sup>1/</sup>	27.2% of 22,900 outlets		38.9% of 22,900 outlets		44.4% of 23,200 outlets	
Special Rate <sup>4/</sup>	1.1%		2.0%		10.7%	
Activity Index <sup>2/</sup>	9,740		12,410		15,650	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
<b>WHOLE BIRDS:</b>						
Fresh - Hens					400	1.88
" - Toms					400	1.88
Frozen - Hens	40	1.47				
" - Toms	20	1.44				
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole					310	3.70
Fresh						
Frozen	870	1.67	110	1.54	660	1.55
Split, bone-in						
Fresh						
Rotisserie	430	7.16	70	6.99	280	7.28
Boneless, whole	10	3.99			20	4.99
Cutlets	630	5.17	140	5.02	880	4.58
Cutlets, thin sliced	180	4.99	140	5.10		
Strips					540	4.99
Tenders	30	5.99	20	4.37	760	4.38
Marinated Tenders	70	4.66	180	4.18	480	4.75
Drumsticks	40	1.73	100	2.17	40	1.72
Thighs	10	1.99			40	2.29
Wings	30	1.72	110	2.12	20	1.44
Necks			20	1.79	10	1.19
Smoked Drumsticks			10	2.49	70	1.97
Smoked Wings	10	1.99	10	2.49	70	2.04
Smoked Necks					60	1.96
<b>GROUND TURKEY:</b>						
	6,320	3.50	10,220	3.53	9,270	3.34
Patties	880	3.55	890	3.54	820	3.44
Sausage	780	3.07	1,010	3.91	1,810	3.24
85% lean	1,190	2.75	1,620	2.87	2,200	2.67
93% lean	2,590	3.52	6,140	3.57	3,050	3.20
Breast	880	4.71	560	4.80	1,390	4.77
Rolls (frsh/frz 1 lb.)	560	2.58	660	2.88	240	1.91
<b>Specialty <sup>5/</sup></b>						
Patties	170	4.00	100	5.23	50	3.99
93-94% lean	310	4.50	520	4.92	870	3.87
Breast	10	6.59			180	5.99

Note: rolls & specialty not included in ground turkey total and weighted average.

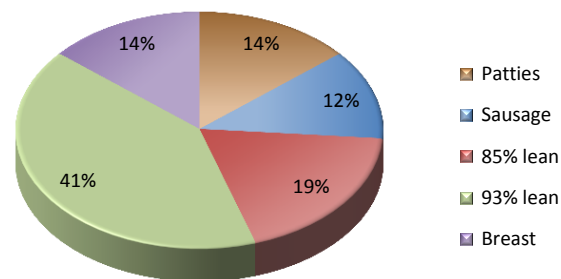
## This Week's Turkey Feature Highlights

Retail feature activity declines on turkey and deli items. A few ads on frozen hens and toms appear in this week's circulars, but retailers have yet to turn their attention to whole turkeys. It will be a few more weeks before whole turkey moves to center stage. Offerings increase on frozen bone-in breasts; prices are lower. Retailers increase offerings of rotisserie breasts and boneless white parts; cutlets are the most actively promoted this week. Dark parts are lightly featured; advertised prices are lower. There are fewer promotions on ground turkey; prices are mostly lower. The sharpest decline is on 93% lean offerings, although 93% lean is still the most popular grind. Feature activity slows on service deli and self-service deli. Offerings increase on processor brand thick slicing turkey, slows on most of the other service deli items. Self-service deli offerings increase on private brands, decline on processor brands.

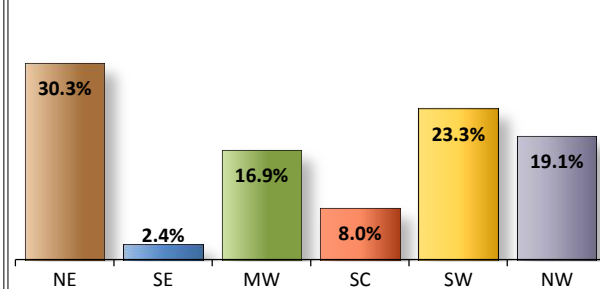
## Turkey Promotional Activity by Category



## Ground Turkey Featuring by Type



## Relative Feature Activity by Region



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

**1/ Feature Rate:** the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/ Activity Index:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/ Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/ Special Rate:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.). **5/ Specialty:** products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Sep 05, 2014

	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)		
<b>Special Rate</b> <sup>4/</sup>	<b>51.8% of 4,700 sampled outlets</b>			<b>6.5% of 5,900 sampled outlets</b>			<b>30.6% of 4,200 sampled outlets</b>		
<b>Activity Index</b> <sup>2/</sup>	<b>2.7% of stores w/ no-price promotions</b>			<b>1.7% of stores w/ no-price promotions</b>			<b>0.6% of stores w/ no-price promotions</b>		
	<b>Activity Index = 3,850</b>			<b>Activity Index = 410</b>			<b>Activity Index = 1,950</b>		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens							1.39	10	1.39
" - Toms							1.39	10	1.39
Frozen - Hens									
" - Toms									
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.99 - 1.88	240 1.72		1.59 - 1.69	70 1.65		1.29 - 1.99	520 1.64	
Split, bone-in									
Fresh									
Rotisserie	5.99 - 8.99	170 6.27							
Boneless, whole	3.99	10 3.99							
Cutlets	4.59 - 5.49	560 5.16		5.99	30 5.99				
Cutlets, thin sliced	4.99	180 4.99							
Strips									
Tenders				5.99	30 5.99				
Marinated Tenders									
Drumsticks	1.59	10 1.59					1.59 - 1.69	20 1.66	
Thighs									
Wings	1.59	10 1.59					1.59	10 1.59	
Necks									
Smoked Drumsticks									
Smoked Wings							1.99	10 1.99	
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	2.99 - 3.98	330 3.31		2.99 - 3.29	40 3.06		2.98 - 3.50	100 3.14	
Sausage	2.79 - 4.29	150 3.38		2.99	10 2.99		2.86 - 4.79	60 3.84	
85% lean	3.02 - 3.07	30 3.04		2.99 - 3.27	140 3.19		2.33 - 2.99	560 2.75	
93% lean	3.07 - 4.99	1,100 3.56		3.07 - 3.59	80 3.43		2.91 - 3.99	500 3.38	
Breast (99-100% lean)	3.76 - 6.15	680 4.77					4.58	10 4.58	
Rolls (frsh/frz 1 lb.)				2.99	10 2.99		2.69 - 2.99	130 2.97	
<b>Specialty</b> <sup>5/</sup>									
Patties	3.99 - 4.00	170 4.00							
93-94% lean	3.99 - 4.99	210 4.32					4.49	10 4.49	
Breast									



# USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/05 thru 09/11.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Sep 05, 2014

	SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
<b>Feature Rate</b> <sup>1/</sup>	<b>18.7% of 4,200 sampled outlets</b>			<b>31.3% of 2,800 sampled outlets</b>			<b>40.5% of 1,200 sampled outlets</b>		
<b>Special Rate</b> <sup>4/</sup>	<b>0.0% of stores w/ no-price promotions</b>			<b>0.0% of stores w/ no-price promotions</b>			<b>0.0% of stores w/ no-price promotions</b>		
<b>Activity Index</b> <sup>2/</sup>	<b>Activity Index = 920</b>			<b>Activity Index = 1,950</b>			<b>Activity Index = 660</b>		
	Price Range (\$/pound)	Summary Stores    Wtd Avg		Price Range (\$/pound)	Summary Stores    Wtd Avg		Price Range (\$/pound)	Summary Stores    Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens	1.49	30    1.49							
" - Toms	1.49	10    1.49							
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.49 - 1.79	30    1.72					1.88	10    1.88	
Split, bone-in									
Fresh									
Rotisserie	9.99	10    9.99		5.99 - 8.99	240    7.64		7.99	10    7.99	
Boneless, whole									
Cutlets	4.59	40    4.59							
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders							4.66	70    4.66	
Drumsticks	1.99	10    1.99							
Thighs	1.99	10    1.99							
Wings	1.99	10    1.99							
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	3.49 - 3.50	110    3.49		3.49 - 4.99	280    4.07		3.49	20    3.49	
Sausage	2.86 - 3.50	60    3.40		2.45 - 2.86	420    2.61		4.09	80    4.09	
85% lean	2.79 - 2.99	120    2.90		2.39 - 3.19	320    2.52		2.33	20    2.33	
93% lean	2.79 - 3.50	200    3.46		2.79 - 4.00	380    3.42		3.19 - 4.39	330    3.79	
Breast (99-100% lean)	3.74 - 5.00	100    4.05		4.79 - 5.19	80    5.09		4.79	10    4.79	
Rolls (frsh/frz 1 lb.)	1.99 - 2.99	180    2.55		1.99 - 2.50	220    2.40		1.99	20    1.99	
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean				4.59	10    4.59		4.59 - 4.99	80    4.94	
Breast							6.59	10    6.59	



# USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 09/05 thru 09/11.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

Fri. Sep 05, 2014

	NATIONAL SUMMARY						NORTHEAST U.S.			SOUTHEAST U.S.		
	This Week		Last Week		Last Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
Feature Rate <sup>1/</sup>	76.6% of 22,900 stores		74.6% of 22,900 stores		81.2% of 23,200 stores		87.9% of 4,700 sampled outlets			75.5% of 5,900 sampled outlets		
Activity Index 2/	45,480		48,890		56,190		Activity Index = 13,700			Activity Index = 10,550		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	6,870	8.07	5,950	8.37	3,360	8.43	6.98 - 10.49	3,380	8.50	6.49 - 9.99	1,490	7.13
Private Brand	1,690	7.42	2,530	8.42	1,870	7.64	6.99 - 8.49	950	7.12	6.99 - 7.99	580	7.86
<b>Category 2</b>												
Processor Brand	4,090	6.20	4,400	6.11	4,320	5.79	4.99 - 6.99	1,320	6.58	4.69 - 6.99	140	5.28
Private Brand	2,440	6.81	4,300	6.83	2,980	6.33	5.98 - 6.99	270	6.41	6.49 - 6.99	160	6.70
<b>Category 3</b>												
Processor Brand	990	3.93	610	4.10	2,100	4.02	3.98 - 4.99	480	4.06	2.98 - 3.99	100	3.54
Private Brand	70	4.88	40	3.98	1,420	6.94	3.99 - 5.48	60	5.03			
<b>Turkey Ham</b>												
Processor Brand	300	4.11	340	4.08	260	3.50	3.99 - 4.99	170	4.43	2.99 - 4.99	60	3.79
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	270	4.82	300	4.38	490	5.40	3.99 - 4.99	250	4.80	4.99	20	4.99
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	2,480	8.00	3,920	7.71	5,110	7.51	6.49 - 9.99	1,110	8.29	6.99 - 8.49	250	8.31
Private Brand	1,820	7.24	1,930	7.51	1,560	7.10	6.99 - 7.98	1,010	7.11	7.99	500	7.99
<b>Category 2</b>												
Processor Brand	150	5.22	300	5.82	210	5.57	5.98 - 5.99	20	5.99			
Private Brand	1,320	5.31			290	5.31	4.99	410	4.99			
<b>SELF-SERVICE DELI</b>												
(dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	8,280	3.47	9,110	3.33	11,800	3.00	2.50 - 4.00	1,110	3.32	2.49 - 4.00	2,250	3.49
Private Brand	3,310	3.02	3,080	2.75	3,220	3.00	2.99 - 3.33	1,060	3.04	2.99 - 3.49	1,380	3.00
<b>Turkey 16 oz</b>												
Processor Brand	290	5.77	50	5.85	2,430	4.67	5.49 - 5.99	210	5.75	5.99	60	5.99
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	7,800	3.51	9,040	3.34	11,550	3.00	2.50 - 4.00	830	3.42	2.49 - 4.00	2,180	3.50
Private Brand	3,310	3.02	2,990	2.76	3,220	3.00	2.99 - 3.33	1,060	3.04	2.99 - 3.49	1,380	3.00

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



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(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate <sup>1/</sup>	76.0% of 4,200 sampled outlets			71.1% of 4,200 sampled outlets			70.0% of 2,800 sampled outlets			75.0% of 1,200 sampled outlets		
Activity Index 2/	Activity Index = 9,370			Activity Index = 6,270			Activity Index = 3,130			Activity Index = 2,460		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	6.49 - 9.99	690 8.22		6.99 - 8.99	600 7.80		7.49 - 9.49	390 7.98		7.99 - 9.99	320 8.08	
Private Brand	6.99 - 7.99	60 7.24		6.49 - 8.99	100 7.87							
<b>Category 2</b>												
Processor Brand	4.49 - 6.99	1,210 6.24		4.69 - 5.49	1,030 5.94		4.99 - 5.99	350 5.84		4.98 - 5.99	40 5.15	
Private Brand	5.98 - 6.99	1,230 6.34		5.99 - 8.49	340 7.22		7.99 - 8.49	290 8.06		7.99 - 8.49	150 8.04	
<b>Category 3</b>												
Processor Brand	2.98 - 3.99	140 3.87		2.99 - 3.99	220 3.93		3.67	50 3.67				
Private Brand	3.98	10 3.98										
<b>Turkey Ham</b>												
Processor Brand	3.49	10 3.49					2.99 - 3.79	60 3.64				
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand												
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	6.49 - 9.99	520 7.77		6.49 - 9.99	140 7.42		6.99 - 8.49	230 7.09		7.99	230 7.99	
Private Brand					310 6.47							
<b>Category 2</b>												
Processor Brand	4.49 - 5.99	30 5.49								4.99	100 4.99	
Private Brand	4.99 - 5.99	870 5.43		5.99	40 5.99							
<b>SELF-SERVICE DELI</b>												
(dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.19 - 3.99	1,900 3.28		2.29 - 2.99	1,520 3.49		2.50 - 3.99	750 3.89		2.49 - 4.48	750 3.71	
Private Brand	2.99 - 3.49	400 3.02		3.00	280 3.00		3.00	130 3.00		3.00	60 3.00	
<b>Turkey 16 oz</b>												
Processor Brand	4.99 - 5.49	20 5.30										
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	2.19 - 3.99	1,880 3.29		2.29 - 3.19	1,410 3.57		2.50 - 3.99	750 3.89		2.49 - 4.48	750 3.71	
Private Brand	2.99 - 3.49	400 3.02		3.00	280 3.00		3.00	130 3.00		3.00	60 3.00	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)

Source: USDA Agricultural Marketing Service, Livestock, Poultry & Grain Market News (515) 284-4471

<http://www.ams.usda.gov/AMSV1.0/LPSMarketNewsPage>

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